
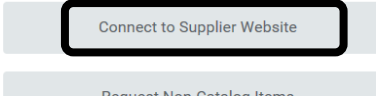
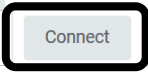
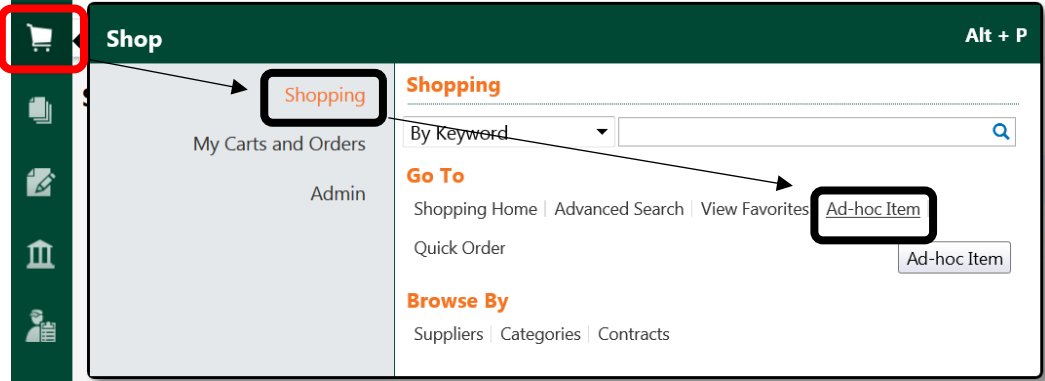
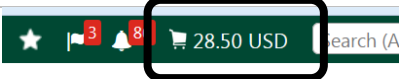
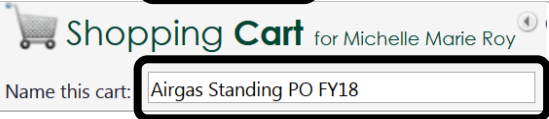
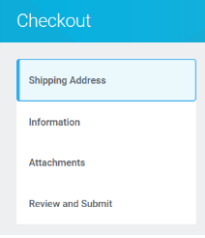
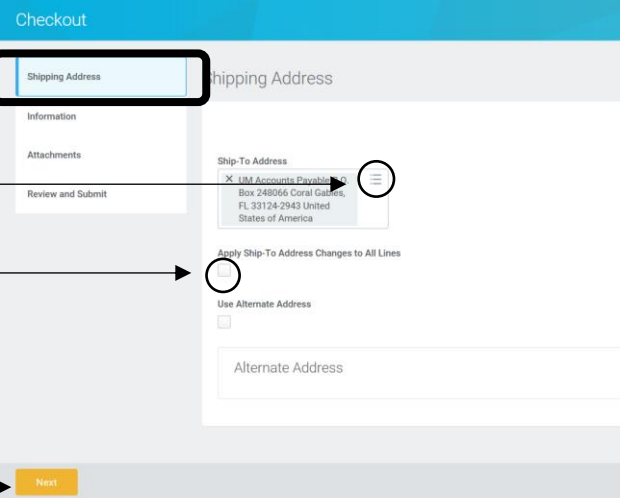
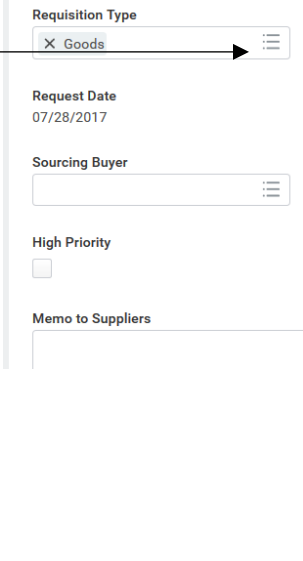


Standing Purchase Orders for Services (Ad-Hoc)

<http://workday.miami.edu>

Create a Standing Purchase Order											
1. Click the Purchases worklet											
2. Click Request Non-Catalog Items .											
3. Select Connect .	Clicking "Connect" will take you to UMARKETPLACE 										
4. Click the Shop icon > scroll over Shopping > Click Ad-hoc Item .											
5. Complete the Ad-hoc Item fields. The price is the estimate amount to be spent this fiscal year.	<p>Ad-hoc Item</p> <p>AIRGAS USA LLC-MIAMI select different supplier</p> <p>7280 NW 58TH STREET, MIAMI, FL 33166-3719 US</p> <table border="1"> <thead> <tr> <th>Product Description</th> <th>Catalog No.</th> <th>Quantity</th> <th>Price Estimate</th> <th>Packaging</th> </tr> </thead> <tbody> <tr> <td>CD USP50 : Carbon Dioxide Usp 50LBS CGA320</td> <td>CD USP50</td> <td>1</td> <td>500.00</td> <td>LO - Lot</td> </tr> </tbody> </table>	Product Description	Catalog No.	Quantity	Price Estimate	Packaging	CD USP50 : Carbon Dioxide Usp 50LBS CGA320	CD USP50	1	500.00	LO - Lot
Product Description	Catalog No.	Quantity	Price Estimate	Packaging							
CD USP50 : Carbon Dioxide Usp 50LBS CGA320	CD USP50	1	500.00	LO - Lot							
6. Click Save and Close . To add more items, repeat steps 4, 5, and 6.											
7. To checkout click the dollar amount next to the shopping cart icon.											
8. Name this cart. Ex: Airgas Standing PO FY18											
9. Click View Cart Details .											
10. Click Send to Workday .											

<p>11. Review the cart and remove any unwanted items. Click Checkout.</p>	
<p>12. The Checkout screens contain the following sections:</p> <ul style="list-style-type: none"> • <i>Shipping Address</i> • <i>Information</i> • <i>Attachments</i> • <i>Review and Submit</i> 	
<p>Shipping Address Tab</p> <p>To change the ship to address, click the stacked lines icon and search for the correct address.</p> <p>Check Apply Ship-To Address Changes to All Lines.</p> <p>Note, the <i>Use Alternate Address</i> needs to be left blank. To load an address into Workday, contact the data entry team at 305-284-5751.</p> <p>Click Next.</p>	
<p>Information Tab</p> <p>Choose a <i>Requisition Type</i>.</p> <p><i>Sourcing Buyer</i> – Leave blank.</p> <p><i>High Priority</i> – Leave blank. If the order needs special attention, contact the approvers as needed.</p> <p><i>Memo to Supplier</i> – Leave blank. Many vendors don't receive these notes. For special instructions, wait for the requisition to get completely approved, then contact the vendor with the PO # and instructions.</p> <p>Click Next.</p>	
<p>Attachments Tab</p> <p>Drag and drop or click Select files. Attachments will appear.</p>	

Requisition	Status	Total Amount	Currency
- new -	Draft	\$900.00	USD

Drop files here

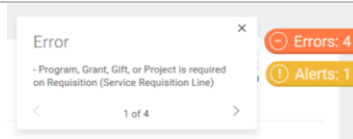
or

Select files

Click Next.

Review and Submit Tab

Upon entering the screen, *Errors* and *Alerts* appear. Once all fields are corrected, the messages will remain but the requisition can be submitted.
HINT: Work left to right. If the errors still appear after completing all fields, try deleting information in ALL editable fields. Then fill them in again.



Scroll down to the section **Goods** or **Services** depending on what is in your cart.

Complete the following fields for all line items.

- Spend Category (former “sub object code”) Ex SC08234 – Gas Cylinders; For assistance, view the *FRS/FDM Conversion Tool* below.
- Requested Delivery Date (optional)
HINT: Type the room number and click enter.
- Ship-To Address (physical address + room)
- Ship to Contact (employee name)
- Deliver to (room number)
- Memo (optional)
- Program, Grant, Gift or Project
- Cost center and additional worktags will autopopulate.

13. Click **Submit**. The pending approver appears.

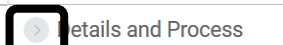
Up Next

Susan Montes

Approval by Program Manager or Project Manager

Due Date 08/17/2017

14. To view more requisition details click **Details and Process**.



15. Click **Process** (former “History”) to view the requisitions history and Purchase Order.



16. Click **Done**.

Common Spend Category Conversions

Note, the FRS/FDM Conversion Tool is not compatible with Internet Explorer. To access the FRS/FDM Conversion Tool, please use either Microsoft Edge, Mozilla Firefox, Google Chrome, or Apple Safari. FRS/FDM Conversion Tool is not recommended for use on mobile devices.

<http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html>

Sub Object and Description	Spend Category and Description
3233 Chemical	SC08200 Chemicals
3218 Clerical Supplies	SC08218 Clerical Supplies
3229 Copy / Pub /Print-Supplies	SC08229 Photocopy, Publishing, & Printing Supplies
3223 Equipment Supplies	SC08203 Equipment Supplies (non-housekeeping)
3213 Food Supplies	SC08208 Food Supplies
3619 Meetings -Subsistence	SC08619 Food / Beverage during the a business meeting
3623 Food Service	SC08623 Food Service – Interdepartmental charges for catering from UM Dining Services
3624 Entertain - FoodBevRec	SC08624 Entertainment – Food, Beverage, Reception
3234 Gas Cylinders	SC08234 Gas Cylinders
3800 Hotel Conf & Seminars	SC08800 – Hotel Conferences & Seminars
3219 Instructional Supplies	SC08219 Instructional Supplies
4268 Managed Equip Maintenance	SC08047 Managed Equipment Maintenance
5105 Non Food Supplies	SC08621 Goods Services for Personal Use
3811 Other Outside Svcs.	SC08811 Outside Services
5904 Printing	SC08229 Photocopy, Publishing, & Printing Supplies
3225 Technical Supplies	SC08225 Technical Supplies Other